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Japan

Fishery Products

Japan Fishery Products Annual Report

2008

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Report Highlights:
Japan's domestic fishery sector continues to decline due to faltering domestic fish resources and industry population. Domestic production of seawater fishery and culture has been decreasing every year and it was 5.6 million metric tons (mmt) in 2007, down 0.7% or 37 mmt from the previous year. Although the import value decreased 4.1%, import volume decreased 8.3% in 2007. Japan is still the world's largest importer in value (when EU countries are disaggregated) of fishery products but it's being overtaken by other countries with growing demand and due to Japan's growing preference for meat over fish.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Tokyo [JA1]
[JA]

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I. Situation and Outlook

Production

Japan's fishery and aquaculture production was 5,696,000 metric tons (mt) in 2007, a decrease of 39,000 mt (0.7%) from the previous year. The seawater fishery catch was 4,378,000 mt. Although sagittated (aka loligo) and Pacific saury increased, mackerel and anchovy catches decreased so the net total was a decline of 92,000 mt (a 2.0% decrease from the previous year).

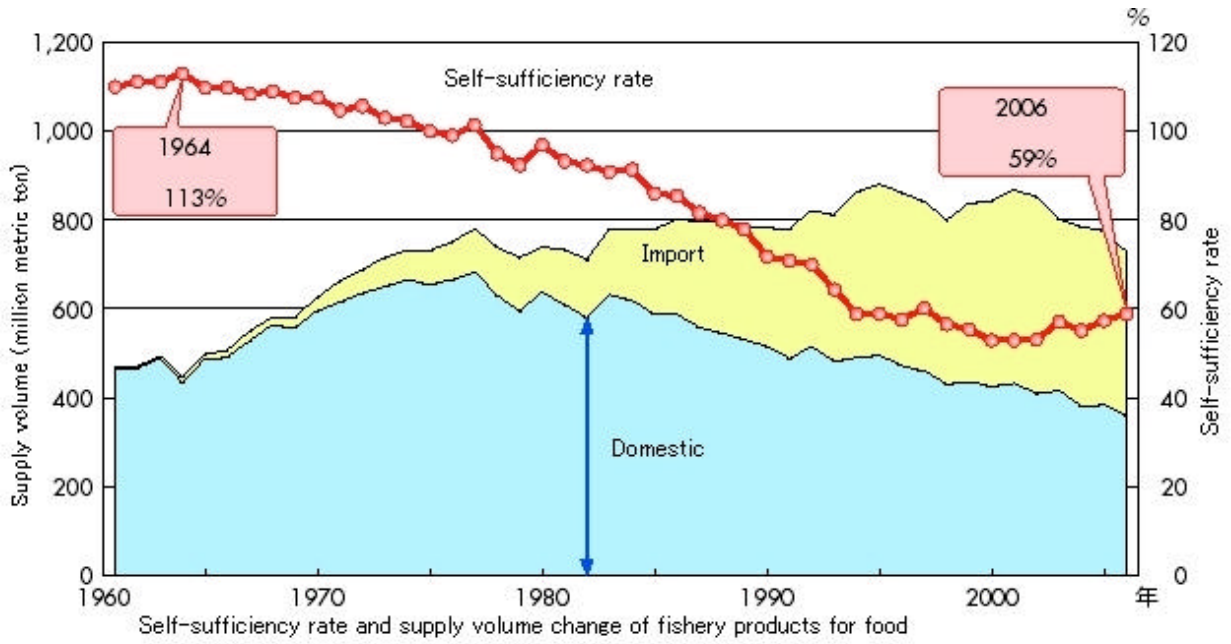
Production of seawater culture was 1,237,000 mt. Although oysters decreased, scallop and laver increased so that total increased by 54,000 mt (a 4.6% increase from the previous year).

For inland water fishery and culture, fish catches and production were 81,000 mt in 2007. Although eel inland water culture increased, salmon, trout and fresh water clam decreased and inland water carp culture decreased which in total resulted in a decline of 2000 mt (a 2.1% decrease from the previous year).

Fishery and Aquaculture Production (1,000 metric tons)				
Category	2006	2007	Comparison	% change 07/06
Fishery and Aquaculture Production Total	5,735	5,669	-39	-0.7
1) Seawater Fishery and culture total	5,652	5,615	-37	-0.7%
Seawater Fishery	4,470	4,378	-92	-2.0%
Seawater Culture	1,183	1,237	54	4.6%
Inland Water Fishing and Culture total	83	81	-2	-2.1
2) Inland Water Fishing	42	39	-3	NA
3) Inland Water Culture	41	42	1	2.3%

1) All fishery catch and production in seawater
2) Catch in major 106 rivers and 24 lakes.
3) Catch of major 4 species. (Trout, sweet smelt, carp and eel)
http://www.maff.go.jp/toukei/sokuhou/data/gyogyou-yousyoku2006/gyogyou-yousyoku2007.pdf

Japan's fishery products self-sufficiency rate peaked at 113% in 1964 and it has been falling since. It was 59% in 2006 up 2% up from the previous year but this increase is misleading. Rather than reflecting an increase in production the self-sufficiency rate increased due to a decline in consumption.



(Source: Fishery white paper, MAFF "Food demand and supply table")

The 0.7% decrease in production reflects a downward trend in the fisheries sector in Japan, mirroring the overall decline in Japanese agriculture. The number of seawater fisheries and aquaculture operations declined by 2.6% in 2006 from the previous year to 121,000, of which 94% are coastal fishery operations mainly run by family labor. There are 6,600 small and medium-scale fishery management entities using hired labor. There are only 105 large-scale fishery management entities, those with a total of 1000 tons or more of motor-powered vessels.

The number of fishery workers is on the decline, too. In 2007 there were 204,330 fishery workers, a declined of 8,140 (3.8%) from the previous year. The decline is due mainly to closures and the overall drop in catch and reduction in business and also due to the retirement of aging fishermen. The percentage of male fishery workers 65 or older is 37.4% up 1.0 % over the previous year.

Similarly, the fisheries cooperatives are also threatened by the recent deterioration of the fishing industry. Japan had 2,273 fisheries cooperatives in 2006. Three quarters of these are running a deficit and efforts are underway to merge in order to improve their business infrastructure. The special merger promotion was extended three more years to March 2010 to aim to merge 250 fishery cooperatives.

Although Japan has the 6th largest exclusive economic zone in the world, 48 percent of the 90 fishery resources in the waters surrounding Japan are facing seriously low levels. To improve fishery resources, as of February 2008, the Government of Japan (GOJ) has 51 resource recovery plans on the books for 76 species in operation. These plans began 4 years ago but have not yielded much improvement except for "Zuwai crab". Zuwai crab fishermen have put effort to voluntarily follow their own regulation stricter than ministerial order so that its resource has been heading for recovery.

Rising oil prices have had a serious effect on the fishing industry since the fishing industry relies on fuel as its major input cost. Moreover, fishermen are finding it difficult to pass on the cost to their buyers since the selling price is determined at auction. In July, sixteen fishery organizations including the Japan Fishery Association and National Federation of Fisheries Cooperative Association – organized a fishing work stoppage to protest their situation and call for government assistance. Among the most highly publicized was the All Japan Squid Fishing Council (AJSFC), a voluntary association, which stopped fishing for two days from June 18, 2008 to draw attention to their plight. Tuna Fishing Co-op announced on July 4th it will partially stop fishing for two years from August 1st, 2008. Please refer the GAIN report JA8045 from the link below.
http://www.fas.usda.gov/gainfiles/200807/146295154.pdf

As a result of these protests, on July 28 the GOJ announced 74.5 billion yen package of countermeasures against high oil prices for fishing industry. The package includes six programs worth 8 billion yen to directly compensate for high oil prices.

In addition to the economic reasons for the decline in the vitality of fishing villages there is also the overall social trend away from the regions and toward big cities. Small towns and fishing villages all over Japan are suffering as a result of the outflow of young adults. As a result, the remaining workers are of advanced age. For example, the percentage of male workers over 60 years old in Japan was 47.9% of total workers up 1.0% over previous year. Despite various efforts, the downward trend will continue because the number of the new employees was only around 1,242 in 2006 and most of these are from fishing villages and newcomers from other industries are limited. It is a real challenge to secure a young labor force.

Import Market

Japanese fishery products imports in 2007 decreased 8.3% by volume over the previous year to 2,890,000 mt. The import value also decreased, although by a smaller percentage, 4.1% in 2007. Japanese fishery products imports accounted for $14.73 billion dollars, or 18%, of world fisheries trade in 2005 (the equivalent of 3,343,000 mt). However, consumption of fishery products stalled in the mid 1980's and more recently has been on the decline. In 2006, consumption of fresh meat has surpassed that of fresh fish for the first time. The weight of fresh fish consumed in 2007 was 12,225 g per person down 10.4% from ten years prior. Annual fresh meat consumption in 2007 was 12,996 g per person up 2.4% from ten years ago. On the other hand, the consumption of fishery products is on the rise elsewhere in the world due largely to positive health attributes associated with fish. As a result, the Japanese share of world imports has fallen from a peak of 16.4% in 1995 to 10.6% in 2005 (in volume terms).

Major Fishery Products Import Volume and Amount
(Weight: 1000 MT, Value 100 million yen)

	2002	2004	2005	2006	2007	Comp. Ratio	% Change 07/06
Volume total	3,821	3,485	3,343	3,153	2,890		-8.3%
Amount total	17,622	16,371	16,687	17,068	16,365	100%	-4.1%
Shrimp	2,974	2,380	2,352	2,480	2,259	14%	-8.9%
Tuna & bonito	2,404	2,335	2,152	2,306	2,174	13%	-5.7%
Salmon & Trout	1,046	1,016	1,095	1,070	1,421	9%	32.8%
Crab	898	807	690	697	658	4%	-5.6%
Cod and Pollock Roe	476	568	603	494	416	3%	-15.8%
Shrimp (processed)	475	522	524	621	601	4%	-3.3%
Eel (processed)	625	657	500	552	512	3%	-7.2%
Squid	460	437	466	488	524	3%	7.5.
Other	8,264	7,649	8,305	8,360	7,800	47%	-6.7%

(Source: 1996-2005 data: Fishery White paper, 2005-2007 data: Forest Products and Fishery Products Trade Summary 2007, made based on Ministry of Finance "Trade Statistics")
1) Volume: Quantity is the weight by the form at the time of customs clearance.
2) Shrimp, tuna & bonito, salmon & trout, crab, squid: Amount is sum of live, fresh, chilled and frozen.
3) Cod and Pollock Roe is sum of fresh, chilled, frozen, salted and smoked.

Japan's major imported fishery products are: shrimp, tuna and bonito, salmon and trout, crab, cod and Pollock roes, processed shrimp, and processed eels. These items account for about half of total fishery product imports. China has been the largest fishery products supplier in volume and value since 1998. The volume of imports was 610 mmt down 10.4% and value was 334 billion yen, 20.4% share and down 12.6% in 2007 from the previous year. Fishery products imports from the United States were 304 mmt and value was 141 billion yen, or USD 1.19 billion at 118 yen/US$, (8.6% share) in 2007 and the U.S. ranked second after China (334 billion yen, or USD 2.83 billion at 118 yen/US $, 20.4% share) as the biggest supplier. Japan is still the largest export market for U.S. fish and seafood. However its share of exports has shifted dramatically from 64% in 1995

down to 20% in 2007. This reflects growing competition from U.S. and third country consumers. Japan has to compete with other buyers for its seafood.

II. Statistical Tables

For HS codes please see 7) Tariff Codes and Rates.

1) Salmon & Trout

Salmon and Trout Imports into Japan							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2006	2007	- 07/06 -	2006	2007	- 07/06 -
0	--World--	202,423	196,540	-10.0	918.6	880.3	-4.2
1	Chile	114,446	114,464	1.7	478.3	446.5	-6.7
2	Russia	31,032	28,929	-3.0	114.0	125.4	10.0
3	Norway	25,809	25,401	-20.9	166.9	163.1	-2.3
4	**U. S. A.**	**19,456**	**20,168**	**-41.1**	**83.6**	**94.5**	**13.0**
5	Canada	6,143	2,568	-17.1	44.9	18.6	-58.6

Salmon and Trout Imports into Japan: 6-month Update (Jan-Jun)							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2007	2008	- 08/07 -	2007	2008	- 08/07 -
0	--World--	111,017	121,938	3.4	488.5	484.4	-0.9
1	Chile	84,837	96,990	7.8	340.0	326.7	-3.9
2	Norway	13,983	11,577	-2.1	87.1	83.2	-4.5
3	**U. S. A.**	**4,877**	**5,494**	**-16.6**	**22.7**	**27.0**	**18.7**
4	Russia	3,919	3,964	10.3	16.6	19.5	17.5
5	Canada	876	1,370	-62.8	6.3	11.3	80.1

(Source: Japan Customs (WTA))

2) Sockeye Salmon

Sockeye Salmon Imports into Japan							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2006	2007	- 07/06 -	2006	2007	- 07/06 -
0	--World--	44,755	45,731	-19.5	184.8	209.4	13.3
1	Russia	24,649	25,597	-0.5	97.3	115.9	19.1
2	**U. S. A.**	**18,159**	**19,555**	**-39.9**	**74.9**	**90.2**	**20.3**
3	Canada	1,942	578	280.6	12.6	3.3	-73.4
4	S. Korea	0	0	-93.8	0.0	0.0	0.0
5	China	5	0	0.0	0.0	0.0	-100.0

Sockeye Salmon Imports into Japan: 6-month Update (Jan-Jun)							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2007	2008	- 08/07 -	2007	2008	- 08/07 -
0	--World--	7,965	9,042	-2.0	36.8	44.8	21.8
1	**U. S. A.**	**4,742**	**5,279**	**-12.7**	**22.0**	**25.9**	**17.5**
2	Russia	3,040	3,731	14.2	14.1	18.7	32.2
3	Canada	182	32	466.5	0.6	0.2	-61.6
4	S. Korea	0	0	0.0	0.0	0.0	0.0
5	China	0	0	0.0	0.0	0.0	0.0

(Source: Japan Customs (WTA))

3) Sujiko (Hard Salmon Roes)

Sujiko (Hard Salmon Roes) Imports into Japan							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2006	2007	- 07/06 -	2006	2007	- 07/06 -
0	--World--	3,560	3,119	-12.4	42.1	39.9	-5.2
1	**U. S. A.**	**2,449**	**2,450**	**0.0**	**20.8**	**28.2**	**35.4**
2	Denmark	859	608	-29.2	17.3	10.5	-39.2
3	Finland	93	30	-67.8	1.5	0.6	-59.2
4	Canada	41	21	-49.3	0.4	0.3	-2.6
5	Sweden	0	5	0.0	0.0	0.1	0.0

Sujiko (Hard Salmon Roes) Imports into Japan: 6-month Update (Jan-Jun)							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2007	2008	- 08/07 -	2007	2008	- 08/07 -
0	--World--	693	466	-32.7	11.6	11.1	-4.8
1	Denmark	563	390	-30.7	9.4	9.2	-1.7
2	Finland	30	46	54.8	0.6	1.2	94.6
3	**U. S. A.**	**92**	**30**	**-67.2**	**1.5**	**0.7**	**-55.7**
4	Belgium	0	0	0.0	0.0	0.0	0.0
5	France	0	0	0.0	0.0	0.0	0.0

(Source: Japan Customs (WTA))

4) Ikura (Prepared Salmon Eggs)

Ikura (Prepared Salmon Eggs) Imports into Japan							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2006	2007	- 07/06 -	2006	2007	- 07/06 -
0	--World--	3,158	2,145	-32.1	51.5	42.0	-18.4
1	**U. S. A.**	**2,469**	**1,844**	**-25.3**	**41.1**	**36.0**	**-12.3**
2	China	227	155	-31.6	3.0	2.2	-26.1
3	Canada	451	135	-70.1	7.1	3.4	-52.4
4	Thailand	7	6	-12.6	0.1	0.1	13.5
5	Finland	3	2	-25.1	0.1	0.1	-3.8

Ikura (Prepared Salmon Eggs) Imports into Japan: 6-month Update (Jan-Jun)							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2007	2008	- 08/07 -	2007	2008	- 08/07 -
0	--World--	132	89	-32.6	2.1	2.0	-7.1
1	China	72	51	-29.8	0.9	0.9	-0.3
2	Thailand	1	19	1,222.4	0.0	0.4	1,337.6
3	**U. S. A.**	**45**	**18**	**-60.7**	**0.9**	**0.6**	**-34.0**
4	Denmark	1	1	32.6	0.0	0.0	-40.9
5	Finland	0	1	0.0	0.0	0.0	0.0

(Source: Japan Customs (WTA))

5) Surimi (Fish Paste)

Surimi (Fish Paste) Imports into Japan							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2006	2007	- 07/06 -	2006	2007	- 07/06 -
0	--World--	295,474	297,348	0.6	677.4	706.3	4.3
1	**U. S. A.**	**117,797**	**107,455**	**-8.8**	**262.6**	**256.1**	**-2.5**
2	Thailand	70,906	69,235	-2.4	141.5	144.6	2.2
3	China	25,633	33,745	31.7	71.9	73.9	2.9
4	India	26,411	25,962	-1.7	46.0	49.2	6.9
5	Vietnam	7,944	16,028	101.8	16.3	28.4	74.5
6	Argentina	14,093	9,242	-34.4	33.9	22.4	-33.9
7	Chile	9,821	8,787	-10.5	39.7	41.5	4.7

Surimi (Fish Paste) Imports into Japan: 6-month Update (Jan-Jun)							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2007	2008	- 08/07 -	2007	2008	- 08/07 -
0	--World--	139,401	143,133	2.7	315.4	490.8	55.7
1	Thailand	33,186	33,814	1.9	65.9	118.3	79.5
2	**U. S. A.**	**46,839**	**33,144**	**-29.2**	**101.5**	**132.9**	**31.0**
3	China	14,565	24,482	68.1	34.2	57.6	68.5
4	India	16,133	20,625	27.8	29.3	62.9	114.5
5	Vietnam	6,287	16,163	157.1	11.3	39.7	253.3

(Source: Japan Customs (WTA))

6) Cod & Pollock Roes

Cod Pollock Roes Imports into Japan							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2006	2007	- 07/06 -	2006	2007	- 07/06 -
0	--World--	58,008	50,933	-12.2	624.2	505.3	-19.1
1	**U. S. A.**	**29,615**	**26,179**	**-11.6**	**304.2**	**240.0**	**-21.1**
2	Russia	14,195	12,228	-13.9	122.1	108.8	-10.9
3	China	11,353	11,034	-2.8	160.2	139.8	-12.7
4	S. Korea	2,287	1,123	-50.9	35.1	14.7	-58.0
5	Iceland	431	217	-49.6	2.1	1.4	-33.7

Cod Pollock Roes Imports into Japan: 6-month Update (Jan-Jun)							
Rank	Country	Quantity (MT)		% Change	$ Value (US$million)		% Change
		2007	2008	- 08/07 -	2007	2008	- 08/07 -
0	--World--	38,285	40,078	4.7	371.9	507.3	36.4
1	**U. S. A.**	**22,427**	**20,183**	**-10.0**	**208.9**	**255.8**	**22.4**
2	Russia	9,871	15,546	57.5	88.3	189.6	114.8
3	China	5,264	3,806	-27.7	66.3	53.8	-18.8
4	S. Korea	548	513	-6.3	7.2	7.9	8.9
5	S. Africa	51	18	-65.3	0.2	0.1	-59.0

(Source: Japan Customs (WTA))

7) Tariff Codes and Rates

The table below shows the import duties levied on fisheries products. There are changes of HS codes for surimi in 2007. But there was no change in tariff rates since last year.

Tariff Codes and Rates for Fishery Products

Category	Item	HS Code (Harmonized System)	Tariff Rates (WTO)
Salmon & Trout	Trout, Fresh, Chilled	30211	3.5%
	Salmon, Pac, Atl & Danube	30212	3.5%
	Salmonidae, Nesoi, Fresh or Chilled	30219	3.5%
	Sockeye Salmon	30311	3.5%
	Pacific Salmon	30319	3.5%
	Trout, Frozen	30321	3.5%
	Atlantic and Danube Salmon	30322	3.5%
	Salmonidae, Nesoi, Frozen	30329	3.5%
Sujiko	Hard Roes of Dalmonidae	30520030	3.5%
Ikura	Caviar and Caviar Substitutes (Ikura)	160430010	6.4%
Surimi	Surimi of Taragra Chalcogramma, Frozen	30499111	6.0%
	Fish Meat of Buri (Seriola spp.), Saba (Scomber Spp.)	30499120	6.0%
	Surimi of Bluefin Tuna, Frozen	30499991	3.5%
	Itoyori, Surimi, Frozen	30499993	3.5%
	Fish Meat of Other Fish, Frozen	30499999	3.5%
Cod & Pollock Roes	Hard Roes of Tara (Gradus spp., Theragra spp.), Fresh or Chilled	30270020	5.6%
	Hard Roes of Tara (Gradus spp., Theragra spp.), Frozen	30380020	6.0%
	Hard Roes of Tara (Gradus spp., Theragra spp.), Salted	30520020	7.5%
	Hard Roes of Tara (Gradus spp., Theragra spp.), Prepared or Preserved, In Airtight Container	160420013	9.0%
	Hard Roes of Tara (Gradus spp., Theragra spp.), Prepared or Preserved, Not in Airtight Container	160420014	9.0%

(Source: Customs Tariff Schedule of Japan)

III. Policy, Marketing and Market Access Barriers

Policy

Japan updated their Fishery Master Plan in March 2007. Based on the plan, the Japanese government will continue to promote resource recovery and sustainable management of marine resources and at the same time will try to develop a management entity which has global competitiveness to ensure stable supply. Also they will try to revitalize the local fishing industry to enable fishing villages to regain their standard of living and lifestyle. The plan is a concrete game plan based on the Fishery Basic Act established in 2001. It was devised for the first time in March 2002, and subsequently revised for the first time in 2007. In the fishery white paper 2008 edition, reference to the plan is made at the beginning of the policy section, and it is the main part of an important fishery policy in Japan. There are six key points in the new plan, as follows:

1) Promote resource recovery and sustainable management of marine resources that are at a low level.

2) Cultivate and ensure that management entities are globally competitive. Establish proactive fishery employment structure and ensure income stability.

3) In order to secure the stable supply of fishery products, implement measures for processing, distribution and consumption

4) Develop and spread new technology for the future of fisheries.

5) Carry out overall maintenance of fishing ports, fishing grounds, and fishing villages. Ensure the "multifunctionality" of fisheries and fishing villages is supported.

6) Reorganize and streamline fishery cooperatives.

Consumption

The volume of fishery products for domestic consumption was 9.53 mmt in 2007, a decrease of 3.8% from the previous year. Of that 7.25 mmt was for food use which accounts for 56.7kg (gross food basis) per person annually. Again, the major trend in consumption patterns is a shift away from fish products and toward more meat and dairy which increased 0.6% and 1.1% respectively over last year. Therefore consumption of edible fishery products (inedible parts are excluded, such as heads, guts, fins and bones) has decreased dramatically from 40.2kg/person-year in 2001 to 31.9kg/person-year in 2007 down 2.8% from the previous year. Several factors explain this situation. In particular, the younger generation is turning more and more away from fish. Children prefer new foods (e.g. Western, meat-based foods). Many more Japanese are turned off by the effort they believe is involved in preparing fish. Also, the price of fish is comparatively high price versus meat.

Marketing

The 2008 edition of the Fishery White Paper encourages consumption of more fish species caught in areas surrounding Japan in order to improve self-sufficiency in fishery products. To do that, the paper explains the importance of keeping Japan's fish-eating culture. Fish- eating culture does not mean only to eat a lot of fish. It is believed that fish-eating culture is the concept of wisdom and knowledge to utilize fish that has been developed and passed down over generations as part of the fish-based Japanese diet. Fish-eating culture includes fishing technique, quality indicators and recognition, process and preservation methods and various cooking tools and menus.

However, fish consumption has shown rapid decrease especially among the young generation. The volume of fish purchased by an average person dropped about 30% from 1965 to 2006. Purchase of species such as salmon, tuna, bonito and Pacific saury increased 1.4 times, however purchase of mackerel, prompano fish, and squid decreased by roughly one half. According to a survey conducted by the Ministry of Agriculture, Forestry and Fishery (MAFF) in 2007, ease of preparation affected consumers' decisions about which species of fish to purchase. Also the survey shows that children prefer sashimi to boiled fish because of ease of eating.

After the collapse of the economic bubble, demand for low-price and easy-cooking products increased markedly. Large super market chain stores began to merchandise easy to cook products such as pre-sliced or processed fish, imported tuna and salmon which have abundant supply to satisfy uniform consumer needs. This kind of change in consumer preferences has impacted the domestic fishing industry. For example, the increase of imported fish contributed to a price slump for domestic fishery products and some say it encouraged over-fishing. Since Japanese fishermen felt pressure to catch more fish in order to meet the low price of imports it may have led to over-fishing. The majority of each Japanese species is not abundant enough to be supplied constantly into chain store distribution.

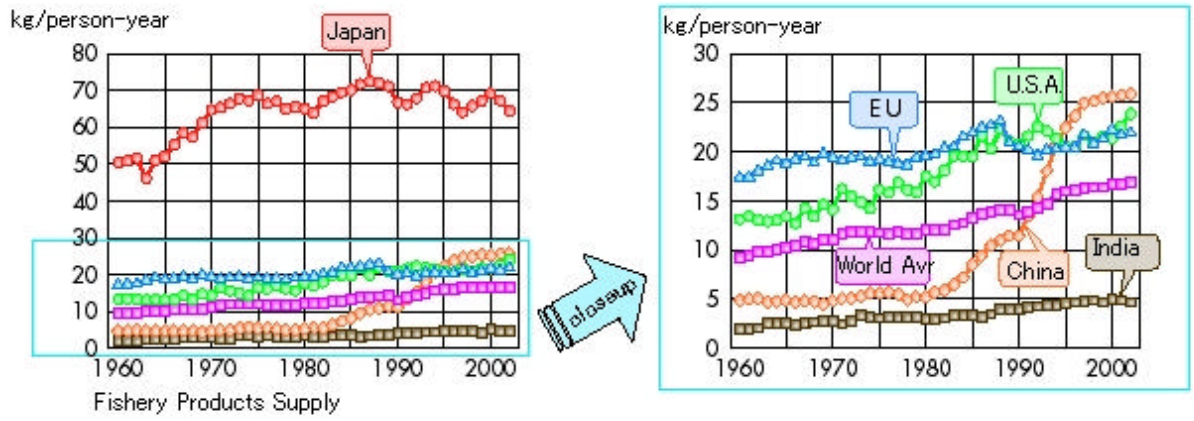
The Japanese Government is promoting consumption of one more domestic fish every four season per person which will contribute to a 4% increase in the self-sufficiency rate. However, species in surrounding Japan which have abundant fish resources are limited.

Fishery products labeling was introduced after the Japan Agricultural Standards (JAS) Law was revised in 1999. Country of origin or local origin labeling started from July 1, 2000 for fresh fisheries products. It is required to show "Name" and "land of origin". As for processed fisheries products, "name", "material", "use-by date" and "storage condition" were required to be shown as of April 1, 2000. Japan had expanded labeling requirements for processed foods traded among dealers. This new regulation requires place of origin labeling for materials for final products. Please click the link below for details in the GAIN report JA8002.
http://www.fas.usda.gov/gainfiles/200802/146293678.pdf

New Market Opportunities

Japanese fishery products consumption has been on downward trend and this will continue because of the reason stated in the Marketing section in this report. Although worldwide demand for fishery products is increasing, Japan is still one of the largest fishery products consumers in the world. According to the "Food balance sheets" by FAO and MAFF statistical data show that Japan's annual supply volume per person is 3.8 times larger than world average it is even 2.5 times more than China in 2003.

Annual supply volume for one person



(Source: FAO "Food balance sheets (1961-2003)", MAFF "Food supply and demand table"))

The UK-based organization "Marine Steward Ship Council (MSC)" launched its "Marine eco label" in Japan in 2006 and MSC labeled products are sold in the large supermarket chain, AEON and at the Japan Consumers' Co-operative Union (JCCU). Also those are sold in high end supermarkets such as Kinokuniya and Meiji-ya. AEON and JCCU both explain Marine eco labeling products and the importance of sustainable fishing on their websites.

The Japan Fisheries Association (JFA) has started to certify sustainable fishing since December 2007 via its "Marine Eco Label (MEL) Japan". The first certified products will be in the market by the end of 2008. These products are targeted for consumers who have environmental awareness.

Market Access Barriers

The food sanitation law was revised in 2003, and the so-called "Positive List" system of regulating Maximum Residue Limits (MRL) became effective in May 2006. This system regulates MRLs for agro chemicals, animal drugs, and feed additives that are used domestically and internationally. A single violation of an MRL stops distribution of the food and leads to 50% testing of all like product imported from the country in violation. Please see details of this system http://www.fas.usda.gov/gainfiles/200602/146176749.pdf and also new related reports are continuously uploading at USDA's attaché report website:

http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp, and search with Commodities* Sanitary/Phytosanitary/Food Safety and Country: Japan.

On July 28, 2008, the U.S. Food and Drug Administration (FDA) advised against consumption of tomalley from American Lobster (also known as "Maine Lobster"). They found dangerous levels of toxins that cause Paralytic Shellfish Poisoning in tomalley of American Lobsters which are harvested from the waters of the Atlantic Ocean from Northeastern Canada to South Carolina. This advisory applies only to tomalley and not to lobster meat. As a result, the Ministry of Health, Labor and Welfare (MHLW) requires voluntary testing for importers who import lobster from the United States and Canada (whose lobster are similarly affected). To date, there have been 3 positive findings in Canadian lobsters as of September 2008 and no positive findings in U.S. lobsters. As a result, Canada is under mandatory testing that requires all shipments from Canada be held at customs until completion of testing.

Japan has some other regulations for food such as labeling requirements, packaging requirements, food additives and so on. Details are explained in FAIRS Country Report JA8052. Please click the link below:

http://www.fas.usda.gov/gainfiles/200808/146295490.pdf